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Greece

Fresh Deciduous Fruit

Annual

2000

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Report Highlights:

January frosts had little affect on Greek apple and pear crops, with 2000 yields forecast at slightly above average production of 325,000 MT for apples and 68,000 MT for pears. Apple imports are expected to continue at approximately 11,000 to 14,000 MT annually. While Greece imports no pears from the U.S., in 1999 the U.S. share of apple imports increased to about 20 percent. Present forecasts for the 2000 table grape crop stand at about 310,000 MT. Imports of table grapes are minimal, as Greece is a major producer.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Unscheduled Report

Athens [GR1], GR

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Section I: Situation and Outlook - Narrative

Production

Fresh Apples and Pears

The freezing temperatures during the second half of January and the resulting frosts in the mainland of Greece did not affect either the apple or pear crops. Present forecasts indicate that the year 2000 will yield slightly above average production for both apple and pear crops as growing conditions during the first six months of 2000 were in generally favorable with normal precipitation. The 2000 apple crop will be close to 325,000 MT while the pear crop will be close to 68,000 MT. Further, the Ministry of Agriculture revised upwards its 1998 and 1999 apple crop figures for both acreage and production to 14,900 and 15,300 hectares and 332,000 and 310,000 MT respectively for these two years. The explanation given for the increase in acreage is attributed to the inclusion of data from non-organized orchards (scattered trees, etc.), and thus these new figures are considered as more realistic. The slight upward shift in acreage can also be attributed to incentives provided by the current horticultural regime to uproot old orchards (2 million Drachmas per hectare), which are generally replanted with apples, as they are profitable in the fresh market. In the case of pears, the revisions were made only for production, changing the figures for 1998 and 1999 to 69,300 and 66,000 MT respectively, as shown in the PS&D Tables.

Fresh Table Grapes

Present forecasts for the 2000 table grape crop stand at about 310,000 MT. Total fresh table grape production for 1998 has been revised slightly upwards by the Ministry of Agriculture to 310,000 MT while that for 1999 has been revised downwards to 287,000 MT from the earlier estimate of 300,000 MT. This production decrease was due to unfavorable weather conditions, specifically an extended heat wave at the end of July coupled with rains recorded in August and first half of September. These weather conditions also adversely affected table grape quality, especially the sultanina variety in the Corinthia district.

Market / Competitor Statements

Fresh Apples & Pears

Imports of apples are expected to continue at approximately the same levels of recent years of about 11,000 to 14,000 MT annually. These imports serve to fill gaps between domestic production and consumption while at the same time satisfying the market for better quality products. In 1999, the U.S. share of apple imports totaled about 20 percent while the bulk (50 percent) came from EU countries and the balance (30 percent) from countries of the Southern Hemisphere, predominantly Chile. Consumption patterns remain quite stable and

there are no foreign supplier promotion activities. Exports of apples in recent years have varied from 13,000 to 16,000 MT annually, and are channeled to neighboring countries that have lower quality standards and are low price markets. Pear imports in recent years have varied from 15,000 to 17,000 MT annually. No pears are imported from the U.S. but over 70 percent come from EU countries. Spain, in particular, is responsible for about 60 percent of the total imports, with another 15 per cent coming from the Southern Hemisphere. As in the case of apples, imports of pears cover shortages in supplies when domestic production can not cover demand. Exports of pears are quite small, close to 1,000 MT annually, and they are all destined for neighboring countries that are seeking low cost product.

Table Grapes

Since Greece is a major producer of table grapes, imports of such grapes are quite small, ranging from 700 to 1400 MT annually. This small amount that is imported basically covers off-season demand and special varieties not grown in Greece. No table grapes are imported from the U.S. and the majority come from EU countries, with a very small amount from Chile. Exports of table grapes are sizeable, ranging from about 102,000 to 111,000 MT annually. Over 75 percent of exports go to EU destinations, with Germany receiving about 40 percent and the U. K. receiving over 26 percent. Eastern European countries take in the balance of about 25 percent.

Import Tariff Rates

The basic import tariff rate for all three fresh deciduous fruits (apples, pears and table grapes) is at present 4.8 percent ad valorem. Additional levies are applied to this rate by the European Union. These rates are applied in EUROS and vary depending on the type of product as well as the time period.

Apples:	Aug. 1-Dec 31	Per 100 kgs net
	45.5 EURO and above 9% ad valorem 45.5 EURO and below 11.2% ad valorem + 0.9-23.5 EURO	
Pears:	Aug. 1-Oct. 30	Per 100 kgs net
	38.8 EURO and above 10.4% ad valorem 38.8 EURO and below 10.4% ad valorem + 0.8-23.8 EURO	
	Nov 1-Dec 31	
	51.0 EURO and above below 10.4% ad valorem 51.0 EURO and below 10.4% ad valorem + 1.0-23.8 EURO	

Table Grapes:	July 21-Oct 31
	54.6 and above 14.1 ad valorem 54.6 and below 17.6 ad valorem + 1.0-9.6 EURO
	Nov 1- Nov 20
	47.6 and above 11.5% ad valorem 47.6 and below 14% ad valorem + 1.0-9.6 EURO
	Nov 21-Dec 31
	Depending on the variety 8-11ad valorem

Exchange Rates

1998	\$ 1.00 = 294.30 Drachmas
1999	\$ 1.00 = 305.85 Drachmas
Jan. – Aug. 2000	\$ 1.00 = 352.27 Drachmas

Section II: Statistical Tables

PS&D Tables, Fresh Apples

PSD Table						
Country	Greece					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	13700	14900	13900	15300	0	15500
Area Harvested	13600	14700	13600	14900	0	15200
Bearing Trees	5170	5750	5170	5840	0	5930
Non-Bearing Trees	30	50	130	160	0	120
Total Trees	5200	5800	5300	6000	0	6050
Commercial Production	293800	318700	288000	297600	0	312000
Non-Comm. Production	12200	13300	12000	12400	0	13000
TOTAL Production	306000	332000	300000	310000	0	325000
TOTAL Imports	9000	11000	9000	14000	0	12000
TOTAL SUPPLY	315000	343000	309000	324000	0	337000
Domestic Fresh Consump	256100	284100	258000	271000	0	279000
Exports, Fresh Only	13900	13900	12000	16000	0	14000
For Processing	4000	4000	4000	2000	0	4000
Withdrawal From Market	41000	41000	35000	35000	0	40000
TOTAL UTILIZATION	315000	343000	309000	324000	0	337000

Export Trade Matrix, Fresh Apples

Export Trade Matrix			
Country	Greece		
Commodity	Fresh Apples		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Holland	85	Protugal	628
Italy	469	Other EU	144
Portugal	392	>Sub Total EU	772
Other EU	8	Albania	10060
>Sub Total EU	954	Bulgaria	5508
Albania	8817		
Bulgaria	2034		
Russia	748		
Israel	579		
Cyprus	497		
Total for Others	13629		16340
Others not Listed	625		1672
Grand Total	14254		18012

Trade data for this product is only available for the calendar year.

Import Trade Matrix, Fresh Apples

Import Trade Matrix			
Country	Greece		
Commodity	Fresh Apples		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.	671	U.S.	2987
Others		Others	
France	574	Italy	3661
Holland	1076	Germany	1025
Germany	354	Holland	971
Italy	2983	Other EU	1773
Spain	1012	>Sub Total EU	7430
Other EU	714	Chile	3597
>Sub Total EU	6713	S. Africa	548
Chile	3570		
S. Africa	212		
Total for Others	10495		11575
Others not Listed	118		74
Grand Total	11284		14636

Trade data for this product is only available for the calendar year.

PS&D Table, Fresh Pears

PSD Table						
Country	Greece					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	11400	11600	11400	11600	0	11600
Area Harvested	11400	11600	11400	11600	0	11600
Bearing Trees	4100	4200	4100	4200	0	4200
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	4100	4200	4100	4200	0	4200
Commercial Production	61300	67200	63000	64000	0	65900
Non-Comm. Production	1900	2100	2000	2000	0	2100
TOTAL Production	63200	69300	65000	66000	0	68000
TOTAL Imports	15000	15000	13000	17000	0	15000
TOTAL SUPPLY	78200	84300	78000	83000	0	83000
Domestic Fresh Consump	67500	73200	70300	72900	0	72800
Exports, Fresh Only	1000	1400	1000	1400	0	1400
For Processing	9000	9000	6500	8400	0	8500
Withdrawal From Market	700	700	200	300	0	300
TOTAL UTILIZATION	78200	84300	78000	83000	0	83000

Export Trade Matrix, Fresh Pears

Export Trade Matrix			
Country	Greece		
Commodity	Fresh Pears		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
EU	26	Spain	263
>Sub Total EU	26	>Sub Total EU	263
Albania	987	Albania	755
Bulgaria	186	Bulgaria	233
Cyprus	140		
Total for Others	1339		1251
Others not Listed	96		103
Grand Total	1435		1354

Trade data for this product is only available for the calendar year.

Import Trade Matrix, Fresh Pears

Import Trade Matrix			
Country	Greece		
Commodity	Fresh Pears		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Spain	12474	Spain	10287
Holland	605	Holland	907
France	232	Italy	709
Italy	332	Other EU	473
Other EU	20	>Sub Total Eu	12376
>Sub Total EU	13663	Serbia	1606
Chile	551	S. Africa	2340
Nigeria	463		
Total for Others	14677		16322
Others not Listed	70		1103
Grand Total	14747		17425

Trade data for this product is only available for the calendar year.

PS&D Table, Fresh Table Grapes

PSD Table						
Country	Greece					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	19000	19000	18500	18500	0	18500
Area Harvested	19000	19000	18500	18500	0	18500
Commercial Production	283000	288000	279000	267000	0	288300
Non-Comm. Production	22000	22000	21000	20000	0	21700
TOTAL Production	305000	310000	300000	287000	0	310000
TOTAL Imports	703	703	1000	1413	0	1000
TOTAL SUPPLY	305703	310703	301000	288413	0	311000
Domestic Fresh Consump	137833	139833	133000	135955	0	141000
Exports, Fresh Only	110870	110870	103000	102458	0	110000
For Processing	57000	60000	65000	50000	0	60000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	305703	310703	301000	288413	0	311000

Export Trade Matrix, Fresh Table Grapes

Export Trade Matrix			
Country	Greece		
Commodity	Fresh Table Grapes		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Holland	9640	Holland	5803
Germany	50645	Germany	41382
U.K.	25846	U.K.	26783
Other EU	2082	Other EU	1016
>Sub Total EU	88213	>Sub Total EU	74984
Poland	12943	Poland	13509
Czechia	2365	Czechia	2413
Romania	2373	Albania	4068
Albania	2092		
FYROM	1947		
Total for Others	109933		94974
Others not Listed	5303		7484
Grand Total	115236		102458

Import-export 1999 trade matrices are all based on preliminary data supplied by the N.S.S. with one exception. In the case of table grapes, export data is supplied by the Ministry of Agriculture and is considered to be more accurate.

Import Trade Matrix, Fresh Table Grapes

Import Trade Matrix			
Country	Greece		
Commodity	Fresh Table Grapes		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Holland	342	Italy	640
Germany	77	Holland	314
Italy	172	Other EU	219
Other EU	4	>Sub Total EU	1173
>Sub Total Eu	595	Chile	146
Chile	72		
Total for Others	667		1319
Others not Listed	36		94
Grand Total	703		1413

Import-export 1999 trade matrices are all based on preliminary data supplied by the N.S.S. with one exception. In the case of table grapes, export data is supplied by the Ministry of Agriculture and is considered to be more accurate.

1999 Average Import CIF Prices for Apples

Country of Origin	V a r i e t y a n d T a r i f f C o d e					
	Golden Delicious 08081020		Granny Smith 08081050		Not Specified 08081090	
	Drs/kg	\$/kg	Drs/kg	\$/kg	Drs/kg	\$/kg
U.S	232	76	-	-	225	74
Italy	199	65	183	60	207	68
Germany	275	90	231	76	184	60
Chile	279	91	274	90	271	89

(1999 Exchange rate 305.85 Drachmas/\$1.00 U.S.)

1999 Average Exportt FOB Prices for Apples

Country of Destination	V a r i e t y a n d T a r i f f C o d e					
	Golden Delicious 08081020		Granny Smith 08081050		Not Specified 08081090	
	Drs/kg	\$/kg	Drs/kg	\$/kg	Drs/kg	\$/kg
Albania	56	18	62	20	64	21
Bulgaria	107	35	73	24	96	31

1999 Average Import CIF Prices for Pears

Country of Origin	Variety not Specified	
	Tariff Code 08082050	
	Drs/kg	\$/kg
Spain	192	63
Holland	289	94
Serbia	124	41
South America	258	84

Comparable export prices for pears are not given for the volume of pears exported is quite small

1999 Average Export FOB Prices for Table Grapes

Country of Destination	Variety not Specified - Tariff Codes*					
	8061010		08061095		08061097	
	Drs/kg	\$/kg	Drs/kg	\$/kg	Drs/kg	\$/kg
Germany	59	19	269	88	364	119
U.K	83	27	84	27	-	-
Poland	131	43	125	41	-	-
Albania	45	15	54	18	80	26

08061010 table grapes, 08061095 exports from 7/15 to 10/31 08061097 exports from 11/1 to 12/31

The high prices of the shipments to Germany refer most likely to the Sultanina (Thompson – seedless) variety.

Comparable import prices for table grapes are not given since the volume of table grapes imported is very small.

Indicative wholesale prices for apples, pears and table grapes at the Athens Central Market during 1999

Domestically Produced			Imported	
	Drs/kg	\$/kg	Drs/kg	\$/kg
Apples	180-320	0.59-1.05	230-360	0.75-1.18
Pears	230-800	0.75-2.62	250-550	0.82-1.80
Table Grapes	150-750	0.49-2.45	-	-

Wholesale prices for apples, pears and table grapes at the Athens Central Market Jan. – July 2000

Domestically Produced			Imported	
	Drs/kg	\$/kg	Drs/kg	\$/kg
Apples	180-280	0.51-0.80	250-400	0.71-1.14
Pears	300-1100	0.86-3.14	300-550	0.86-1.57
Table Grapes	250-550	0.71-1.57	-	-